

Help Center

Just a click away!



Reports

e-book

ChildPlus
Desktop



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childplus.com

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The Help Center and Agency Customization

The articles in the Help Center and videos in the Learning Library are based on the default setup of ChildPlus and assume full security access to all platforms, modules, features and fields. If you cannot find or access a feature referenced in an article, be aware that your agency's specific customization of ChildPlus determines:

- Your access to each platform
- Your access to specific modules or features
- Security or location restrictions for your level of access to ChildPlus
- Whether a module or feature has been turned on
- Which fields are available in each module
- The content of drop-down fields

Contact your ChildPlus administrator to verify your security access and the availability of a feature referenced in an article.

If you are a ChildPlus administrator and need to configure security access or turn on a feature, see [User Security Groups](#) or [contact us](#) for additional assistance.

Help Center Updates and ChildPlus Platforms

The Help Center is continually updated to reflect the current version of ChildPlus. Ensure that you are using the [latest version of ChildPlus](#) and referencing an article for the appropriate ChildPlus platform. Instructions for modules often differ between ChildPlus Online and ChildPlus Desktop and are unique for the Attendance App.

- To find out which version of ChildPlus you are using, see [About ChildPlus](#).
- For more information about the different platforms and how to access them, see [Platform Comparison](#).
- To learn about the differences between the modules in ChildPlus Desktop and ChildPlus Online, see [Module Comparison](#).

Table of Contents

Reports	5
Locate a Report	6
Report Search	6
Report Category Listing	6
Run a Report	7
Filter Participants	8
Filter Data	11
Format a Report	11
View a Report	12
Report Navigation	13
View Individuals	14
Close a Report	15
Custom Filters	16
Apply a Custom Filter	17
Create a Single Expression Filter	18
Create a Multiple Expression Filter	20
Create a Multiple Expression Filter Using Parentheses	22
Custom Filter Templates	24
Basic Query Operators	25
Additional Query Operators	27
Grid Reports	28
Miscellaneous Reports	28
Customize Grouping	29
Group Data	29
Rearrange a Column	29
Remove a Column	30
Filter a Column	31
Sort a Column	31
Search Within a Grid Report	32

Reports

The **Reports** module provides a way to view and compile data. Each report is designed for a specific purpose and knowing which report to use depends on the type of data you want to see.

Locate a Report

All ChildPlus reports have an assigned number and are grouped by category. You can access reports through the report search feature or by selecting a report from the category listing.

Report Search

Use the report search feature to locate a report by its assigned number. This feature is helpful if you know the report number and want to access it immediately.

[ChildPlus Desktop](#)

To locate a report by number in ChildPlus Desktop:

1. Go to **ChildPlus Desktop**.
2. Enter a report number in the report search field from any window in ChildPlus Desktop.



As you enter a number in the report search field, ChildPlus displays all reports that match the number. For example, if you enter the number 2, ChildPlus will display all reports that begin with 2.

3. Select the report.
-

Report Category Listing

Use the report category listing to locate a report. This feature is helpful if you know the category of the report you want to run but do not know the report name or number. Some report categories are combined. For example, **Application** reports display in the **Enrollment** category and **Immunizations** reports display in the **Health** category. Most reports only appear in one category and are listed in numerical order.

[ChildPlus Desktop](#)

To locate a report by category in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
 2. Select a category.
 3. Select the report.
-

Run a Report

Configure the options on the report setup window to decide who and what to display on a report. Each report has default settings that you can use to immediately view data. Clear or edit the default settings as needed. Explore each option on the report setup window to ensure that the data you want to see will display on the report.



When you run a report, ChildPlus retains the settings you select until you change them. This only applies to standard reports and not **LiveMessage** or **LiveReport**.

Filter Participants

Use participant filters to determine which participants to include on a report. Participant filters display on the left side of the report setup window and display on both standard and grid reports. Filter options must be selected before you can run a report. ChildPlus retains the settings you select until you change them.

Most **Personnel** reports include the option to filter by position. Reports created using **LiveReport** and **LiveMessage** include additional filters. **Module Designer** reports include the same filters used on standard reports.

ChildPlus Desktop

To filter participants in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Select an option for each applicable *filter*.

Filter	Description
Program Term	Display participants with a participation record associated with a specific Program Term
Program Option	Display participants within a specific Program option Use the default selection of ALL if your Program only operates with one option
 Group	Display participants from a specific Participant Group
Group By Agency	Group data by agency
Group By Region	Group data by region Regions are associated with sites, which can be grouped by location or responsible staff member This option is only available if regions are set up in your database
Agency	Display participants associated with a selected agency
Site	Display participants associated with a selected site
Classroom	Display participants associated with a selected classroom
Responsible Staff	Display participants associated with the staff member listed in their records for a selected service area



ChildPlus administrators can configure **Participant Groups** in **ChildPlus Desktop >> Setup >> System Setup >> Define Participant Group**.

4. Use **Advanced Setup** to apply more than one filter. You can apply additional filters for all settings except **Responsible Staff**.



Click **Show Inactive Locations** to include participants from previous program terms whose sites and classrooms may be closed.

When you apply filters using **Advanced Setup**, ChildPlus disables the fields on the report setup window. To enable the fields and remove the filters applied in **Advanced Setup**, uncheck **Use Advanced Setup**.

5. Select each applicable [enrollment status](#).

Status	Description
New	New applicants who have not been waitlisted, accepted or enrolled
Waitlisted	Applicants whose applications are complete, are eligible for the program and are waiting to be assigned vacant slots
Accepted	Applicants whose applications are complete, are eligible to participate, have been assigned slots and are waiting to attend class or the first home visit
Enrolled	Participants who have been accepted and attended at least one class for the center-based or family child care option or at least one home visit for the home-based option
Dropped	Participants who were enrolled in your program, left before the end of the Program Term and do not anticipate returning for the current Program Term
Drop/Wait	Participants who left your program and anticipate returning for the current Program Term
Drop/Accept	Participants who left your program and have been accepted back into the program for the current Program Term
Completed	Participants who made it to the end of the Program or Program Term
Abandoned	Applicants who never enrolled and are no longer eligible for or interested in the program. They completed an application, but should no longer be included on the waitlist

Filter Data

Use data filters to determine what data to include on a report. Data filters display on the right side of the window and are specific to each report. Use data filters to determine which records will appear on a report and include or exclude specific data. ChildPlus retains the settings you select until you change them.

[ChildPlus Desktop](#)

To filter data in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Select an option for each applicable filter.

Format a Report

Use report formatting to determine how you want data to display on a report. Report formatting options include **Grouping** and **Report Type**. Use **Grouping** to group participants by location. Use **Report Type** to determine the level of detail to display. Not all formatting options are available for all reports. ChildPlus retains the settings you select until you change them.

[ChildPlus Desktop](#)

To format a report in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Select a **Grouping** option. Data can be grouped by **Agency**, **Site** or **Classroom**.
4. Select a [Report Type](#).

Report Type	Description
Detail	Display participants' names and data
Summary	Displays the sum totals for data and hides participants' names
Worksheet	Displays the report as a form that can be used to collect data manually
Individual	Inserts a page break after each individual participant or family

View a Report

Learn how to view a report in ChildPlus.

ChildPlus Desktop

To view a report in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Select a [viewing option](#).

Report Type	Viewing Option	
	Preview	View in Grid
Standard	Displays the report	NA
LiveReport	Displays the report	Displays the report in a customizable grid
Grid	Displays the report in print preview You cannot manipulate the report layout or select links when you select this option	Displays the report in a customizable grid

Report Navigation

Use this section to learn how to move through the pages of a report, locate participants or data within a report and ensure that you are viewing the most recent data.

ChildPlus Desktop

Icon/Text	Description
⏪	First page
⏴	Previous page
⏵	Next page
⏩	Last page
Go to Page	Go to a specific page in the report
🔍	Zoom out
100%	Select a zoom level
🔍+	Zoom in
Save As PDF, Excel, etc.	Export the report to a selected file type
Search	Search for data in the report
Print	Print the report
Refresh	View the most recent data
Close	Close the report
Grid Reports	
Export	Export the report to a selected file type
View in Grid	View the report in a customizable grid
Preview	Preview the report in printed output

View Individuals

Use this option to view data for specific individuals on a report.

ChildPlus Desktop

To display selected individuals on a report in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Click **Individuals**. ChildPlus Desktop displays individuals based on the filters you selected on the **General** and **Custom Filters** tabs and selects all individuals by default.
4. Select the individual(s) to display on the report.



Click **All** to uncheck all selected individuals.

5. Click **Preview**.



When you leave the **Individuals** tab to make changes to the filters on the **General** or **Custom Filters** tabs, ChildPlus Desktop will reset the **Individuals** tab to the default selection of all individuals.

Close a Report

Learn how to close a report in ChildPlus.

ChildPlus Desktop

To close a single report in ChildPlus Desktop, do one of the following:

- Click **X** in the upper right corner of the report setup window
- Click **Close** on the report to return to the report setup window
- Click **X** on the report tab

To close multiple reports in ChildPlus Desktop, right-click a report tab and select one of the following options:

- **Close This Report**
- **Close All Reports**
- **Close All Reports Except This One**



When you sign out of ChildPlus, all reports automatically close.

Custom Filters

Custom Filters provide a way to create specialized lists of participants and reports. You can use **Custom Filters** to filter participant lists in various parts of ChildPlus on the setup windows for most reports. When you create **Custom Filters** in one location, they can be saved and accessed in filter lists across ChildPlus.

Custom Filters generally consist of four parts: a table name, a field name, a query operator and the data to match. The table and field names tell ChildPlus where to look for data; the query operator tells ChildPlus how to compare the data in the specified field to the data to match; and the data to match tells ChildPlus what it is looking for.

If your search is for instances where a field name is empty or not empty, the custom filter will only consist of three parts: a table name, a field name and a query operator.

Apply a Custom Filter

Use this section to apply a custom filter to a report. ChildPlus retains the settings you select until you change them.

ChildPlus Desktop

To apply a custom filter to a report in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Click **Custom Filters**.
4. Select the filter(s) to apply to the report.
5. Select whether to match every filter or any filter. **Match Every Filter (AND)** is selected by default. ChildPlus displays:
 - A count of the total number of filters selected in the tab
 - A summary of the selected filters at the bottom of the window
6. Click one of the following to change how the filter description will display:
 - **Show Details**
 - **Show Summary**



The type of description you select is what will display in the report header.

Create a Single Expression Filter

Use this section to create a single expression custom filter.

To create a single expression custom filter in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Click **Custom Filters**.
4. Click **Add**.
5. Complete the **fields**.

Field	Description
Category	Select the category to base the custom filter on
Name	Enter a name for the custom filter
 Group	Select a group to assign the custom filter to If you do not assign the custom filter to a group, ChildPlus will add it to the ALL group by default
Filter Expressions	
Table	Select the table where the data to filter is located The available tables are based on the selected category
Field	Select a field The available fields are based on the selected table
Operation	Select a query operator The available query operators are based on the selected field
Value	Select or enter a value The available values are based on the selected query operator To filter on records with blank or missing values (for example, gender is missing from a participant's application), leave this field blank



ChildPlus administrators can configure groups for custom filters in **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices >> Custom Filter Group Codes**.

6. Click **Save**, then **Close**. ChildPlus returns to the **Custom Filters** tab.

Example

Use the following as an example of the structure of a single expression custom filter. In this example, the filter generates a list of participants who receive public assistance.

- **Report 2125 - Participant Alphabetical List**
- **Category:** Participants
- **Name:** Public Assistance Income

And/ Or	Open 's	Table	Field	Operation	Value	Close)'s
	0	Enrollment	Income Status Code	EQUALS	Public Assistance	0

Create a Multiple Expression Filter

Use this section to create a multiple expression custom filter. You can use multiple expression filters to search for records that match every expression in the filter using **AND** or any expression in the filter using **OR**. For more information about these query operators, see [Additional Query Operators](#) on page 27.

To create a multiple expression custom filter in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Click **Custom Filters**.
4. Click **Add**.
5. Complete the [fields](#) for the first filter expression.

Field	Description
Category	Select the category to base the custom filter on
Name	Enter a name for the custom filter
 Group	Select a group to assign the custom filter to If you do not assign the custom filter to a group, ChildPlus will add it to the ALL group by default
Filter Expressions	
Table	Select the table where the data to filter is located The available tables are based on the selected category
Field	Select a field The available fields are based on the selected table
Operation	Select a query operator The available query operators are based on the selected field
Value	Select or enter a value The available values are based on the selected query operator To filter on records with blank or missing values (for example, gender is missing from a participant's application), leave this field blank



ChildPlus administrators can configure groups for custom filters in **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices >> Custom Filter Group Codes.**

6. Click **Add** to add another filter expression.
7. Select a [query operator](#) from the **And/Or** field. These query operators are only available for selection when at least one filter expression has been added.
8. Complete the fields for each additional expression you want to add to the filter.
9. Click **Save**, then **Close**. ChildPlus returns to the **Custom Filters** tab.

Example

Use the following as an example of the structure of a multiple expression custom filter. In this example, the filter generates a list of participants who receive public assistance and live in Atlanta.

- **Report 2125 - Participant Alphabetical List**
- **Category:** Participants
- **Name:** Public Assistance and Lives in Atlanta

And/Or	Open ('s	Table	Field	Operation	Value	Close)'s
	0	Enrollment	Income Status Code	EQUALS	Public Assistance	0
AND	0	Family	Physical City	EQUALS	Atlanta	0

Create a Multiple Expression Filter Using Parentheses

Use this section to create a multiple expression custom filter that uses both **AND** and **OR** operators in the query. Using **AND** and **OR** operators together requires the use of parentheses. Parentheses in queries separate the data and tell ChildPlus which part of the query to execute first. For more information about these query operators, see [Additional Query Operators](#) on page 27.

To create a multiple expression custom filter using parentheses in ChildPlus Desktop:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a report.
3. Click **Custom Filters**.
4. Click **Add**.
5. Complete the [fields](#) for the first filter expression.

Field	Description
Category	Select the category to base the custom filter on
Name	Enter a name for the custom filter
 Group	Select a group to assign the custom filter to If you do not assign the custom filter to a group, ChildPlus will add it to the ALL group by default
Filter Expressions	
Table	Select the table where the data to filter is located The available tables are based on the selected category
Field	Select a field The available fields are based on the selected table
Operation	Select a query operator The available query operators are based on the selected field
Value	Select or enter a value The available values are based on the selected query operator To filter on records with blank or missing values (for example, gender is missing from a participant's application), leave this field blank



ChildPlus administrators can configure groups for custom filters in **ChildPlus Desktop >> Setup >> System Setup >> Customize Dropdown Choices >> Custom Filter Group Codes.**

6. Click **Add** to add another filter expression.
7. Select a [query operator](#) from the **And/Or** field. These query operators are only available for selection when at least one filter expression has been added.
8. Complete the fields for each additional expression you want to add to the filter.



Be sure to enter the filter expressions that you want ChildPlus to execute as a group in consecutive order.

9. Enter **1** in the **Open ('s** column of the first filter expression in the group.
10. Enter **1** in the **Close)'s** column of the last filter expression in the group.
11. Repeat steps 9-10 for each additional group of filter expressions that you want ChildPlus to execute together.
12. Click **Save**, then **Close**. ChildPlus returns to the **Custom Filters** tab.

Example

Use the following as an example of the structure of a multiple expression custom filter using parentheses. In this example, the filter generates a list of participants who live in Atlanta or Conyers and receive public assistance.

- **Report 2125 - Participant Alphabetical List**
- **Category:** Participants
- **Name:** Lives in Atlanta or Conyers and Receives Public Assistance

And/Or	Open ('s	Table	Field	Operation	Value	Close)'s
	1	Family	Physical City	EQUALS	Atlanta	0
OR	0	Family	Physical City	EQUALS	Conyers	1
AND	0	Enrollment	Income Status Code	EQUALS	Public Assistance	0

Custom Filter Templates

ChildPlus provides custom filter templates in the **Custom Filter Templates (To Copy)** group that you can use immediately or copy and edit as needed. Use the following table to see the custom filter templates grouped by function.

Function	Custom Filter Name
Age	Actual Age is 4 Years
	Actual Age is 6 Months
	Actual Age is 6 Weeks
	Class Age is 3 Years
CACFP	CACFP Equals Full Reimbursement
Dental	Participant has a Failed Dental Exam
Entry Date	Participant entry date is less than 30 days ago
	Participant entry date is less than 45 days ago
	Participant entry date is less than 90 days ago
	Participant entry date is more than 30 days ago
	Participant entry date is more than 45 days ago
	Participant entry date is more than 90 days ago
Health	Treatment Need but not Received
Hispanic	Participant Race is Hispanic
Immunization	Next Immunization is Due
Income	Eligibility Income is Zero
	Participants who are Over Income
Medicaid	Income Eligible Participants not on Medicaid
Participant Information	Participants Live in Specific City/Town
WIC	Participants Not Receiving WIC

Basic Query Operators

Use query operators to specify the type of information you are looking for when using **Custom Filters**. Use the following table to learn about all of the basic query operators available for custom filters.



The query operators available for each custom filter depend on the type of information you are filtering on.

Operator	Description
ENDS WITH	Selects records that end with a specific character(s) or number(s)
EQUALS	Selects records containing an exact match for the condition you specify For example, Gender EQUALS Female selects only females
GREATER THAN	<ul style="list-style-type: none"> • Date fields: selects records after the specified date • Numeric fields: selects records greater than the specified amount
GREATER THAN OR EQUAL TO	<ul style="list-style-type: none"> • Date fields: selects records on or after the specified date • Numeric fields: selects records greater than or equal to the specified amount
IS EMPTY	Selects records in which the selected field is empty
IS NOT EMPTY	Selects records in which the selected field is not empty
LESS THAN	<ul style="list-style-type: none"> • Date fields: selects records before the specified date • Numeric fields: selects records less than the specified amount
LESS THAN OR EQUAL TO	<ul style="list-style-type: none"> • Date fields: selects records before or on the specified date • Numeric fields: selects records less than or equal to the specified amount
NOT EQUAL TO	Selects records that do not contain the specified condition For example, Gender NOT EQUAL TO Female selects records that are not for females
STARTS WITH	Selects records that start with a specific character(s) or number(s)
IS TODAY	Date fields: selects records with the current date

Operator	Description
IS WITHIN THE LAST X DAYS	Date fields: selects records within the specified number of days and current date
IS WITHIN THE NEXT X DAYS	Date fields: selects records within the specified number of days and current date
IS OVER X DAYS AGO	Date fields: selects records within the specified number of days and current date
CONTAINS	Selects records that contain a specific character(s) or number(s)

Additional Query Operators

These additional query operators control the behavior of custom filters and are helpful when running more than one filter. Use the following table to learn about the additional query operators available for custom filters.

Operator	Description
AND	<p>Use AND when using two or more custom filters. AND joins two custom filters together and is used in situations where you want your results to match both custom filters; it narrows the number of records returned</p> <p>For example, two custom filters are set up - one is for Medicaid Eligibility Code EQUALS P – Potentially Eligible and the other is for Gender EQUALS Female. If you join these two custom filters with an AND operator, then ChildPlus will return records for individuals who have a Medicaid Eligibility Code of P and whose gender is also female. No males or individuals with a Medicaid Eligibility Code other than P will be returned in your query results</p>
OR	<p>Use OR when using two or more custom filters. OR joins two custom filters together and is used in situations where you want your results to match one of the custom filters; it broadens the number of records that are returned</p> <p>For example, two custom filters are set up - one is for Medicaid Eligibility Code EQUALS P – Potentially Eligible and the other is for Gender EQUALS Female. If you join these two custom filters with an OR operator, then ChildPlus will return records for individuals who either have a Medicaid Eligibility Code of P or whose gender is female. Males may be returned in your query result if they have a Medicaid Eligibility Code of P</p>
Parentheses ()	<p>Use parentheses to control the behavior of custom filters. They are necessary if you are generating a custom filter that uses both AND and OR operators. Parentheses separate data and tell ChildPlus which part of the query to execute first</p>

Grid Reports

You can use grid reports to customize grouping, rearrange columns and filter reports directly in the report window in ChildPlus Desktop.

Miscellaneous Reports

All reports in the **Miscellaneous** category, including some standard reports, display as grids. **Miscellaneous** reports display in both the **Miscellaneous** reports category and in the category associated with the data. Within each category, the numbering for **Miscellaneous** reports begins after the numbering for standard reports ends.

Miscellaneous reports also differ from standard reports in how and when they are updated. **Miscellaneous** reports can be updated during or in between official software updates whereas standard reports are only updated during official software updates.

Customize Grouping

Use this section to customize how data is displayed on grid reports. The way data is grouped on grid reports is based on the content of the header rows and the order of the column headers.

Group Data

To group data on a specific column header on a grid report:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a grid report.
3. Apply filters.
4. Click **View in Grid**.
5. Locate the column header in the grid that you want to group the data on.
6. Click and hold the column header.
7. Drag the column header up to the row of headers above the grid. ChildPlus displays up and down arrows above and below the column header to indicate where you can place it.
8. Drop the column header.
9. Repeat steps 5-8 for each column header that you want to group the data on.



To remove the grouping by a column header, drag and drop the column header from the row above the grid back to the first row in the grid. ChildPlus displays up and down arrows above and below the column header to indicate where you can place it.

Click **Refresh** to reset the report to the default view.

Rearrange a Column

To rearrange a column on a grid report:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a grid report.
3. Apply filters.
4. Click **View in Grid**.
5. Locate the column that you want to move.
6. Click and hold the column header.
7. Drag the column header across the header row. ChildPlus displays up and down arrows above and below the column header to indicate where you can place it.
8. Drop the column header.
9. Repeat steps 5-8 for each column that you want to move.



Click **Refresh** to reset the report to the default view.

Remove a Column

To remove a column from a grid report:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a grid report.
3. Apply filters.
4. Click **View in Grid**.
5. Locate the column that you want to remove.
6. Click and hold the column header.
7. Drag the column header to the top of the report window or below the header row in the grid. ChildPlus displays an **X** on the column header.
8. Drop the column header.
9. Repeat steps 5-8 for each column that you want to remove.



Click **Refresh** to reset the report to the default view.

Filter a Column

ChildPlus displays different filter options for each column on a grid report.

To filter a column on a grid report:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a grid report.
3. Apply filters.
4. Click **View in Grid**.
5. Locate the column header that you want to filter.
6. Hover over the column and click **Filter**.
7. Select a filter to apply to the column. ChildPlus displays a summary of the selected filters at the bottom of the window.



To remove a filter, right-click the column header and select **Clear Filter**.

Click **Refresh** to reset the report to the default view.

Sort a Column

To sort a column in ascending or descending order on a grid report:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a grid report.
3. Apply filters.
4. Click **View in Grid**.
5. Locate the column header that you want to sort.
6. Click the column header once to sort the column in ascending order or twice to sort the column in descending order. ChildPlus displays **Ascending ▲** or **Descending ▼** on the sorted column header.



To remove the sorting on a column, right-click the column and select **Clear Sorting**.

Click **Refresh** to reset the report to the default view.

Search Within a Grid Report

To enable the search feature on a grid report:

1. Go to **ChildPlus Desktop >> Reports**.
2. Select a grid report.
3. Apply filters.
4. Click **View in Grid**.
5. Right-click any column header.
6. Select **Show Find Panel**. ChildPlus displays the search box at the top of the window.



To disable the search feature, right-click any column header and select **Hide Find Panel**.